

## **SECTION 12**

### **TARGETED CASE MANAGEMENT GUIDES AND EXAMPLES**

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### TARGETED CASE MANAGEMENT ENCOUNTER GUIDE

	<b>Case scenarios that may or may not be a valid billable TCM encounter</b>	<b>YES</b>	<b>NO</b>
1	A TCM case manager does an assessment and referral for treatment for a TCM client during a face-to-face visit.	X	
2	A TCM client reports to the clinic to receive an actual medical service and/or treatment.		X
3	Outreach activities that attempt to contact potential recipients of a TCM service.		X
4	A TCM case manager performs discharge planning in a hospital setting.		X
5	During a face-to-face TCM encounter, an assessment is done and the TCM case manager determines that the TCM client requires no further assistance at this time.	X	
6	TCM encounters occur with individuals who are inmates of Public Institutions, such as jails, or who are inpatients of Institutions for Mental Disease for more than 24 hours.		X
7	A TCM case manager discusses/reviews a service plan in the presence of a TCM client, who then disagrees with the plan and chooses not to accept the referrals or continued case management.	X	
8	The TCM case manager spends time writing a service plan when the TCM client is not present.		X
9	A translator, or other paraprofessional, accompanies a TCM case manager on a home visit to provide a TCM service component, and the TCM case manager counts and bills for only one encounter.	X	
10	A TCM case manager arranges service for a TCM client during a face-to-face contact.	X	
11	During a face-to-face contact, a TCM case manager assesses and discusses plans with the mother of a TCM infant; however, the infant is not at home.	X	
12	Directly Observed Therapy is given to a Medi-Cal client.		X
13	A family unit is being case-managed, and each family member is a TCM client. The TCM case manager during a face-to-face contact provides a TCM service to each family member during one home visit. The TCM case manager counts and bills for each family member who received a service.	X	
14	A TCM case manager conducts a face-to-face encounter with a TCM client to provide a TCM service component. The TCM client has had an assessment and/or service plan done previously by another TCM case manager and the new TCM case manager does not do another assessment and/or service plan.	X	

	<b>Case scenarios that may or may not be a valid billable TCM encounter</b>	<b>YES</b>	<b>NO</b>
15	In a public health program, a TCM encounter occurs and a TCM service is provided to a Medi-Cal client who is eligible for a limited range of services in an emergency situation, such as emergency services, pregnancy related services, or sensitive services to teens.	<b>X</b>	
16	Crisis assistance planning that is immediate and <b>non-medical</b> in nature is provided to a TCM client by a TCM case manager in an outpatient clinic.	<b>X</b>	
17	Crisis assistance planning that is immediate and medical in nature is provided to a TCM client by a TCM case manager in an outpatient clinic.		<b>X</b>
18	A client is seen at a primary care clinic for a visit and is told they have a urinary infection. The nurse makes a telephone call to be sure the client is taking the antibiotics and is following instructions.		<b>X</b>
19	A TCM Medi-Cal client receives notice of eviction and needs housing; he needs a source of income until he can return to work. During a face-to-face office visit, the public health nurse develops a plan with the client for housing.	<b>X</b>	
20	A teen mom and baby are referred to a case manager by a local pediatrician because the infant has recurrent ear infections. The nurse makes a home visit to assess for reasons for the recurrent infections. She discovers that the teen mom is not in school and that the baby is bottle-fed with a propped bottle. Both the baby and mom are on Medi-Cal.	<b>X</b>	
21	A call comes into the nurse on duty and the caller asks for resources for her respiratory problem. The nurse advises the caller of the clinic and the hours, location, etc.		<b>X</b>
22	During a face-to-face encounter with a TCM client, a TCM case manager observes domestic violence and then counsels the client and refers the client to a shelter.	<b>X</b>	
23	A nurse conducts a follow-up visit with a TCM client who has tuberculosis; the visit <b><u>only</u></b> addresses tuberculosis-related treatment.		<b>X</b>
24	The public guardian TCM case manager provides a referral and conducts a significant telephone contact with a family member acting on behalf of the Medi-Cal-eligible client; the TCM case manager documents the specific information in the case file as to why a face-to-face was not conducted.	<b>X</b>	

## TARGETED CASE MANAGEMENT HIGHLIGHTS

TCM assists Medi-Cal beneficiaries in gaining access to needed medical, social, educational, and other services. The state Department of Health Services (DHS) has obtained approval from the federal Center for Medicaid and Medicare Service (CMS) to provide TCM in six program areas:

- Public Health.
- Outpatient Clinics.
- Public Guardian/Conservator.
- Aging and Adult Services/Linkages.
- Adult Probation
- Community.

CMS will match the local cost of performing allowable TCM. TCM reimbursement is based on a rate per encounter. The service components of TCM are:

- Documented Assessment.
- Development of a Written, Comprehensive, Individualized Services Plan.
- Linkages and Consultation.
- Assistance with Accessing Services.
- Crisis Assistance Planning.
- Periodic Review.

### What You Need to Know to Decide Whether to Participate in TCM

- Which, if any, of your program personnel perform TCM claimable activities?
- What percentage of your service population is certified eligible for Medi-Cal?
- How much of your TCM service costs are already paid for by other funding sources?
- Can you certify the actual expenditure of 100% of allowable local matching funds?

### Steps in the TCM Claiming Process

1. Obtain a copy of the CM Manual from the Local Governmental Agency (LGA) TCM Coordinator. Determine from the manual whether you are currently performing TCM.
2. Identify units and personnel in your organization that perform case management and those that provide support to case managers.
3. Identify funding that meets the federal requirements for local matching funds.
4. Notify the TCM Coordinator that you intend to claim for TCM. The LGA contracts with DHS for the performance of TCM. Your organization must enter into an agreement with the LGA to be reimbursed for TCM services.